



Snapshots™

STARTING OUT MONTHLY BUDGET

Combined Net Monthly Income:	
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Housing	Client	Spouse
Mortgage/Rent		
Property Taxes		
Property Insurance		
Heat		
Hydro		
Water		
Property Maintenance		
Other Housing Cost		
Telephone (Home)		
Telephone (Cell)		
Cable		
Internet		
Other		

Food		
Groceries		
Restaurants		

Clothing		
Purchases		
Cleaning		

Transportation		
Loan/Lease Payments		
Insurance/Plates		
Fuel		
Parking		
Maintenance		
Other		

Household Expenses		
Improvement/Purchases		
Cleaning/Help		
Pets/Pet Care		

Total Monthly Expenses:		
Combined Total Monthly Expenses:		
Net Financial Position (surplus or deficit):		

Personal Care	Client	Spouse
Medical		
Dental		
Vision		
Other		

Personal Insurance		
Life Insurance		
Disability Insurance		
Health Insurance		
Other		

Loan Payments		
Credit Cards		
Lines of Credit		
Investment Loans		
Student Loans		

Capital Accumulation		
Emergency Fund		
Education Fund		
Retirement		
Other		

Lifestyle/Miscellaneous		
Donations		
Personal Gifts		
Regular Vacations		
Entertainment		
Recreation		
Subscriptions		
Cigarettes/Alcohol		
Personal Allowance		
Club Dues		
Lotteries		
Other		